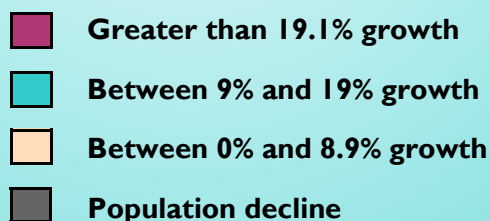
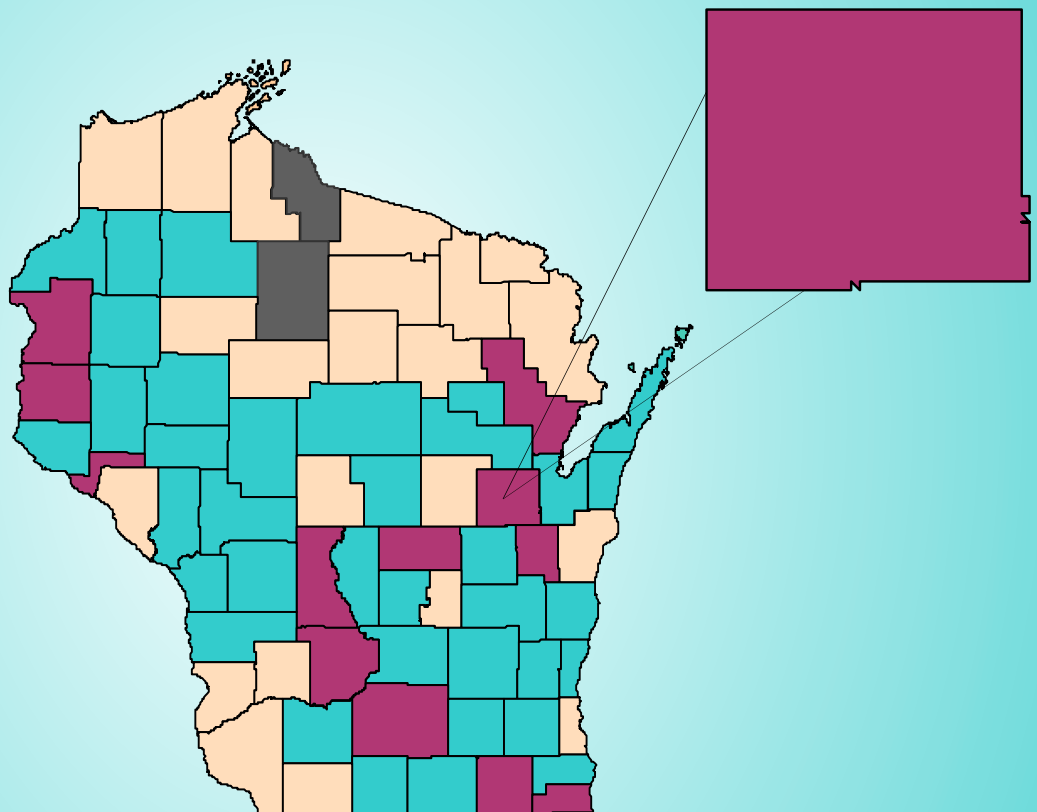


Outagamie County Workforce Profile

Projected population growth from 2000 to 2020



Source: Wisconsin Department of Administration, Demographic Services Center.
Statewide population growth is projected to be 13.9 percent from 2000 to 2020.



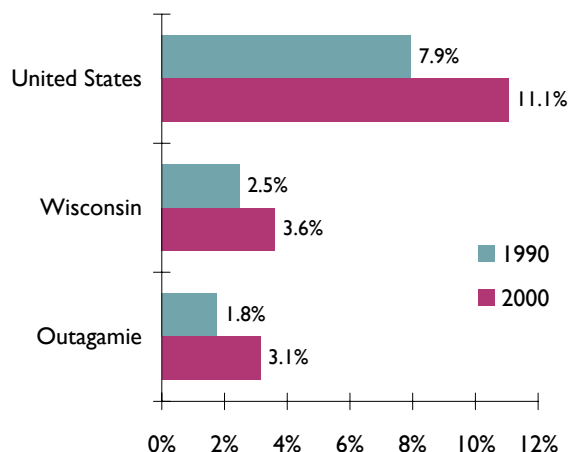
County Population

The Outagamie County population continued its pattern of significant growth over the course of the last two years, growing at a rate of 2.9 percent since 2000. This rate of growth surpassed both the state and national growth rates. This addition of nearly 4,600 new residents in the county continues a period of growth of the 1990s when Outagamie County grew by 13.8%, adding over 19,000 residents to its population.

Growth in the county is divided between two sources. Natural increase, which is births minus deaths, and net migration. This is the difference between the number moving into the county, minus the number moving out of the county. Although the percent of population growth between net migration and natural increase are higher than the statewide average, the proportion between the two are close to the state average. The growth in the state was 56 percent from net migration and 44 percent natural increase. In Outagamie County, 55.5 percent was from net migration. The continuing growth rate of the county will most likely provide the area with economic advantages in the future as the area will have both replacement workers for retirees as well as additional workers for economic expansion.

The portion of foreign-born residents has increased by nearly 50 percent since 1990. This is a rate that

Share of Foreign-born Residents



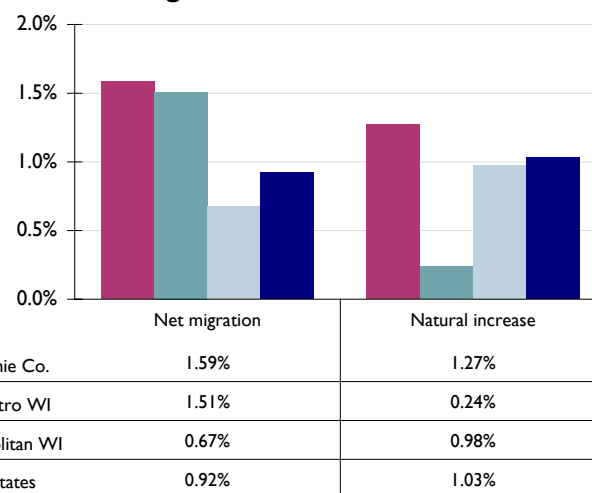
Source: US Dept. of Commerce, Census 2000, Summary file-4, QT-P14

Total Population

| | April 2000 Census | January 1, 2002 estimate | Percent change |
|-------------------------------|----------------------|-----------------------------|-------------------|
| United States | 281,421,906 | 286,923,000 | 2.0% |
| Wisconsin | 5,363,701 | 5,453,896 | 1.7% |
| Outagamie County | 160,971 | 165,570 | 2.9% |
| Largest Municipalities | | | |
| Appleton, City* | 58,301 | 59,257 | 1.6% |
| Grand Chute, Town | 18,392 | 18,998 | 3.3% |
| Kaukauna, City | 12,983 | 13,430 | 3.4% |
| Little Chute, Village | 10,476 | 10,690 | 2.0% |
| Greenville, Town | 6,844 | 7,364 | 7.6% |
| Buchanan, Town | 5,827 | 6,628 | 13.7% |
| Kimberly, Village | 6,146 | 6,245 | 1.6% |
| Freedom, Town | 5,241 | 5,391 | 2.9% |
| Oneida, Town | 4,001 | 4,064 | 1.6% |
| Seymour, City | 3,335 | 3,364 | 0.9% |

* Outagamie County portion only

Net migration and natural increase



Source: Wisconsin DOA, Demographic Services Center & US Census Bureau

comparable to both the state and the nation. As far as the percent living in the county, Outagamie is well below the national average of 11.1 percent, and just slightly below the state average of 3.6 percent.

An interesting facet of the county's population is the distribution of the population by various age
(Continued on page 2)

Outagamie County Workforce Profile

Population Projections by Age Groups in Outagamie County

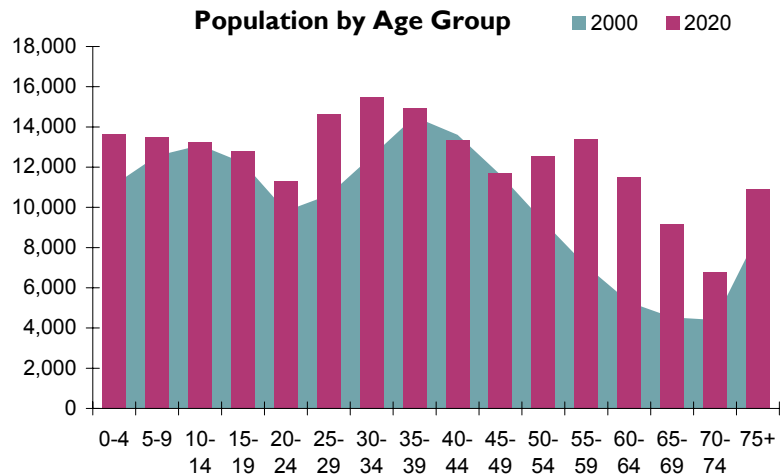
| | 0-4 | 5-9 | 10-14 | 15-19 | 20-24 | 25-29 | 30-34 | 35-39 | 40-44 | 45-49 | 50-54 | 55-59 | 60-64 | 65-69 | 70-74 | 75+ |
|-------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 2000 | | | | | | | | | | | | | | | | |
| Male | 5,755 | 6,537 | 6,723 | 6,270 | 5,039 | 5,481 | 6,278 | 7,404 | 6,910 | 5,899 | 4,651 | 3,496 | 2,613 | 2,103 | 2,016 | 3,110 |
| Female | 5,369 | 6,030 | 6,370 | 5,950 | 4,777 | 5,137 | 6,265 | 7,102 | 6,697 | 5,721 | 4,653 | 3,591 | 2,668 | 2,421 | 2,386 | 5,549 |
| 2005 | | | | | | | | | | | | | | | | |
| Male | 6,044 | 6,171 | 6,865 | 6,768 | 5,794 | 6,036 | 5,935 | 6,531 | 7,529 | 6,831 | 5,749 | 4,457 | 3,172 | 2,353 | 1,815 | 3,454 |
| Female | 5,811 | 5,766 | 6,344 | 6,292 | 5,573 | 5,914 | 5,468 | 6,465 | 7,139 | 6,619 | 5,612 | 4,462 | 3,365 | 2,504 | 2,240 | 5,861 |
| 2010 | | | | | | | | | | | | | | | | |
| Male | 6,224 | 6,376 | 6,396 | 6,892 | 6,235 | 6,896 | 6,547 | 6,181 | 6,637 | 7,427 | 6,646 | 5,504 | 4,044 | 2,859 | 2,038 | 3,545 |
| Female | 5,988 | 6,146 | 5,987 | 6,239 | 5,867 | 6,764 | 6,294 | 5,638 | 6,478 | 7,028 | 6,469 | 5,362 | 4,168 | 3,147 | 2,314 | 5,924 |
| 2015 | | | | | | | | | | | | | | | | |
| Male | 6,621 | 6,513 | 6,588 | 6,400 | 6,329 | 7,466 | 7,404 | 6,800 | 6,267 | 6,532 | 7,210 | 6,352 | 4,989 | 3,646 | 2,480 | 3,776 |
| Female | 6,370 | 6,284 | 6,365 | 5,867 | 5,796 | 7,123 | 7,116 | 6,470 | 5,632 | 6,357 | 6,847 | 6,163 | 4,997 | 3,890 | 2,906 | 6,000 |
| 2020 | | | | | | | | | | | | | | | | |
| Male | 6,952 | 6,873 | 6,725 | 6,587 | 5,873 | 7,571 | 7,994 | 7,660 | 6,892 | 6,167 | 6,342 | 6,894 | 5,765 | 4,508 | 3,175 | 4,314 |
| Female | 6,681 | 6,636 | 6,502 | 6,232 | 5,446 | 7,060 | 7,476 | 7,290 | 6,460 | 5,525 | 6,191 | 6,522 | 5,746 | 4,669 | 3,601 | 6,619 |

Source: Wisconsin Dept. of Administration, Demographic Services, October 2003

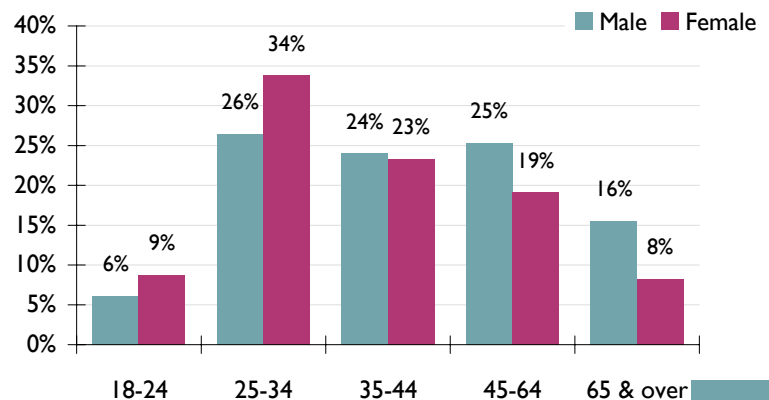
groups. In 2000, the median age of Outagamie County's residents was 34.4 years, which is younger than the median age of Wisconsin at 36.0 years and the national median age of 35.3 years.

As the population ages, the county will be in a better situation than many of Wisconsin's Counties. Many counties are facing the dilemma of having more workers reaching retirement age of 65 than turning age 18 sometime in the next 15 years. Although the county's population will age by that time, the number reaching 18 is expected to remain greater than those retiring through the year 2020, giving the area some reassurance of having not only replacement workers, but also room for economic expansion. Employers, when expanding or locating a business often place higher priority on the availability of workers than on other local resources and incentives.

The county is above the state average in the percent of population with a bachelors degree or higher by one tenth of a percent at 22.5 percent. Currently women make up about 65 percent of college graduates in the state and nation. This is reflected in the higher percentages of women compared to men with degrees under the age of 34.



Percent of age group with at least a Bachelor's degree in Outagamie County



Source: US Dept. of Commerce, Census 2000, Summary file 4, QT-P20

Labor Force Characteristics

The labor force is the sum of those employed and unemployed *that have actively sought work in the last month*. **A labor force eligible resident must be 16 years or older and not a member of an institutional population** such as a prison or an armed forces member living on a military base. The term “unemployed” does not necessarily include all people who are not working. For example, those who are retired or choose not to work are not considered unemployed.

The Outagamie County labor force participation rate is the highest in Wisconsin at 85.8 percent. This is above the nation's rate of 66.9 percent and the state rate of 73 percent. This means that the county is utilizing a larger portion of its population. In effect it also has less reserves to expand the size of its labor force to meet the needs of new businesses in a short time period.

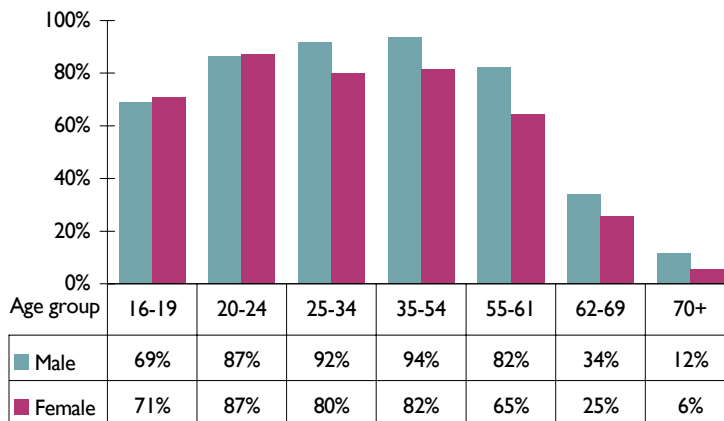
Participation rates vary greatly by age and gender. Generally the highest participation rate occurs between the ages of 25 and 54. After that, workers often begin to remove themselves from the labor market. Although participation is very high for the 20 to 24 age group in Outagamie County.

Participation in the labor force also varies between men and women. Overall, men have a slightly higher participation rate than women, but this has narrowed considerably during the last half century. In Outagamie County, the participation rate for women is equal to or exceeds that of men through age 24. After that the rate for women is lower.

Although population demographics indicate that the county should support the replacement of retirees to the year 2020, the graph on the right indicates that there may be a shortage of replacement workers. This is due in part as this graph uses 2000 labor force participation rates with the 2020 projections by age. In other words, it is assumed that labor force participation rates will not change in 20 years, something not very likely. While the participation rate for the younger set may not change, it is likely that the participation rate for

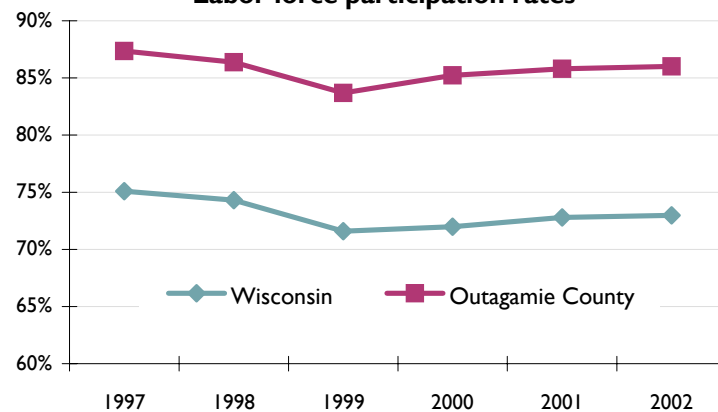
(Continued on page 4)

Outagamie Labor Force Participation by Age & Sex in 2000



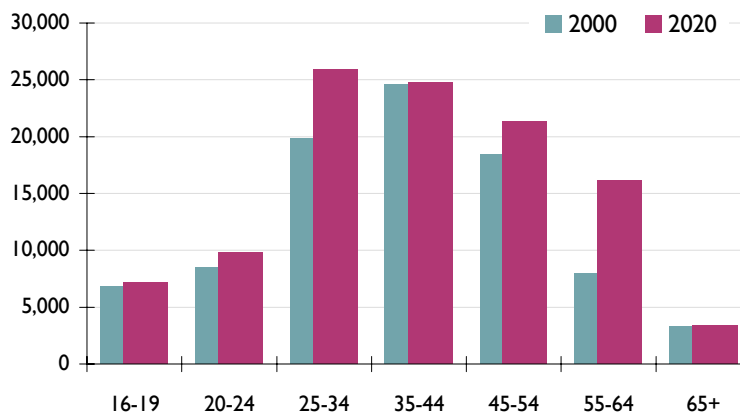
Source: US Dept. of Commerce, Census 2000, Summary file 4, PCT-79

Labor force participation rates



Source: WI DWD, Office of Economic Advisors, 2003

Labor Force by Age in 2000 & 2020 in Outagamie County



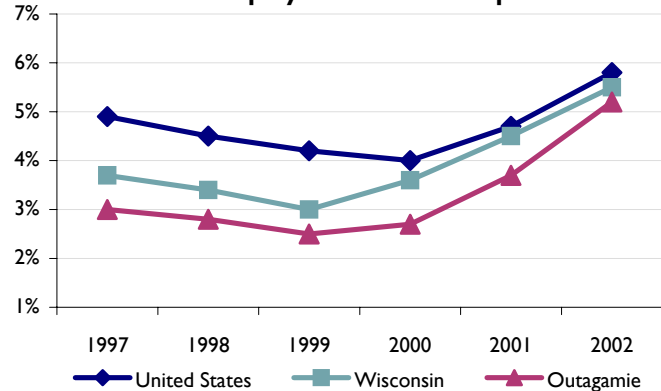
Source: DWD, Office of Economic Advisors, US Census, SF-4 (PCT-79), WI Demographic Services

Outagamie County Workforce Profile

those reaching age 65 will increase. There are several reasons for this. One reason will be the increase of the retirement age by Social Security to age 67. Another reason is increasing healthiness of this population allowing individuals to work longer.

The county's labor force has continued to grow through the economic downturn, however, employment growth has been slower. This has resulted in a near doubling of the number of unemployed. Although unemployment has increased, the unemployment rate has remained below state and nation.

Unemployment Rate Comparison



Outagamie County Civilian Labor Force Data

| | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 |
|-------------------|---------|---------|--------|---------|---------|---------|
| Labor Force | 100,846 | 101,502 | 99,780 | 102,249 | 105,400 | 106,312 |
| Employed | 97,779 | 98,707 | 97,290 | 99,492 | 101,464 | 100,827 |
| Unemployed | 3,067 | 2,795 | 2,490 | 2,757 | 3,936 | 5,485 |
| Unemployment Rate | 3.0% | 2.8% | 2.5% | 2.7% | 3.7% | 5.2% |

Source: WI DWD, Bureau of Workforce Information, LAUS program, 2003

Occupations in demand

Most of the fastest growing jobs in the region require either an associate or bachelor's degree. This is quite different than the jobs that expect the most openings in area. The two lists are quite different in the wages, training requirements.

Although there are fewer jobs in the fastest growing occupations, they offer substantially higher wages, and are transportable to other regions of the state and country.

Many of the fastest growing occupations have a smaller number of positions in the area, so small growth will be a larger percent, while many of the occupations with most openings have a large number of jobs in the area, so it is more difficult to obtain a high growth rate. Another major difference between the two lists is that the fastest growth measures only new openings. The list with most openings contains both new openings as well as openings created by workers leaving the occupations.

Fox Valley Region Occupation Projections: 2010

| | Top Ten Occupations | Education & Training Typically Required* | Average Wage** |
|----------------|-------------------------------------|--|----------------|
| Fastest Growth | Computer Support Specialists | Associate degree | \$19.11 |
| | Desktop Publishers | Postsecondary voc. trng | \$16.74 |
| | Medical Records/Health Info Techs | Associate degree | \$10.98 |
| | Computer Software Engrs Apps | Bachelor's degree | \$31.19 |
| | Network/Computer Systems Admin | Bachelor's degree | \$25.09 |
| | Personal and Home Care Aides | 1-month or less training | \$8.33 |
| | Medical Assts | 1-12 mo. on-the-job training | \$11.21 |
| | Network Sysms/Data Comm Anal | Bachelor's degree | \$14.09 |
| | Social/Human Service Assts | 1-12 mo. on-the-job training | \$11.62 |
| | Fitness Trainers/Aerobics Instruct | Postsecondary voc. trng | \$9.90 |
| Most Openings | Comb Food Prep/Serv Wrk/Incl Fast | 1-month or less training | \$7.37 |
| | Retail Salespersons | 1-month or less training | \$10.25 |
| | Cashiers | 1-month or less training | \$7.62 |
| | Waiters/Waitresses | 1-month or less training | \$6.96 |
| | Registered Nurses | Bachelor's degree | \$20.72 |
| | Labrs/Frght/Stock/Matrl Movers/Hand | 1-month or less training | \$9.91 |
| | Janitors/Cleanrs Ex Maids/Hskpng | 1-month or less training | \$9.32 |
| | Office Clerks/General | 1-month or less training | \$10.62 |
| | Stock Clerks/Order Fillers | 1-month or less training | \$9.88 |
| | Nursing Aides/Orderlies/Attendants | 1-month or less training | \$9.44 |

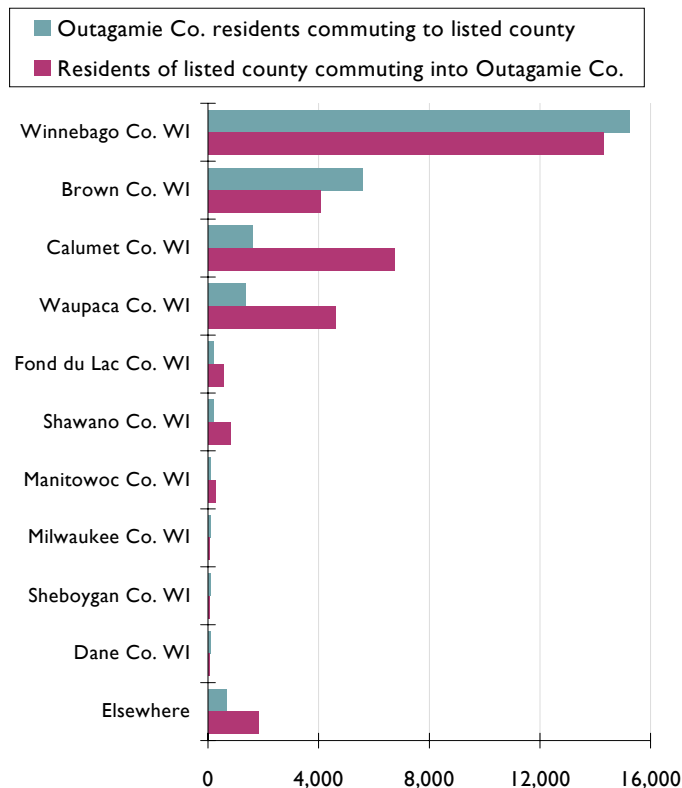
* The most common way to enter the occupation, not the only way

** Wages from Occupation Employment Statistics survey responses for region, 2001
Fox Valley WDA includes Calumet, Fond du Lac, Green Lake, Outagamie, Waupaca, Waushara and Winnebago counties.

Source: WI DWD, Bureau of Workforce Information, 2002

County Commuting Patterns

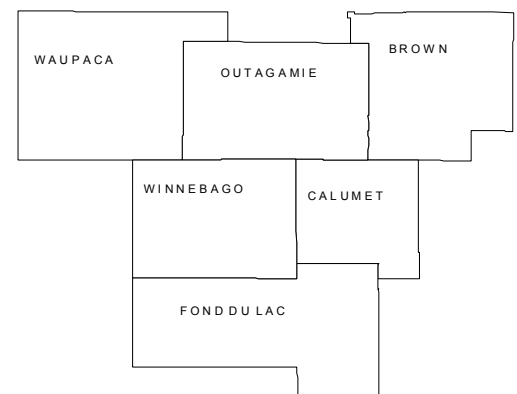
Commuting patterns are looked at during every census, and as would be expected there are changes that occur over the decade. However the change in general commuting patterns often are minimal, since many of these patterns have existed for decades based on the area's economy.



Like most major metropolitan counties, Outagamie County is a net gainer of workers. The county has a net gain of 8,249 workers coming from other counties. Most of these are counties that immediately surround the area, but others are from several hundred miles away. The largest number of workers come from nearby Calumet County. Nearly 6,739 workers commute from Calumet to Outagamie for work, while 1,600 commute the other way. Outagamie does not have a net gain of commuters with all of the counties surrounding it. It loses over 900 workers south to Winnebago County and another 1,500 workers to nearby Brown County. Commuting plays a very big part in the economics of the region.

Based on census data 58,500 workers commute. This is over 25,100 leaving the county and another 33,400 entering the county for work. The area has well a developed highway system which is conducive to commuting. Not only is the county a part of a three county metropolitan statistical area it also borders the Green Bay MSA. In 2005, Fond du Lac County will also be designated as a metropolitan statistical area.

| | Outagamie Co. residents commuting to listed county | Residents of listed county commuting into Outagamie Co. | Net gain or loss of workers |
|--------------------|--|---|-----------------------------------|
| Winnebago Co. WI | 15,233 | 14,300 | -933 |
| Brown Co. WI | 5,573 | 4,074 | -1,499 |
| Calumet Co. WI | 1,611 | 6,739 | 5,128 |
| Waupaca Co. WI | 1,340 | 4,612 | 3,272 |
| Fond du Lac Co. WI | 215 | 568 | 353 |
| Shawano Co. WI | 183 | 812 | 629 |
| Manitowoc Co. WI | 100 | 281 | 181 |
| Milwaukee Co. WI | 84 | 51 | -33 |
| Sheboygan Co. WI | 80 | 68 | -12 |
| Dane Co. WI | 74 | 62 | -12 |
| Elsewhere | 654 | 1,829 | 1,175 |



Source: US Dept. of Commerce, Census 2000, County-to-county worker-flow files

Industry Employment -

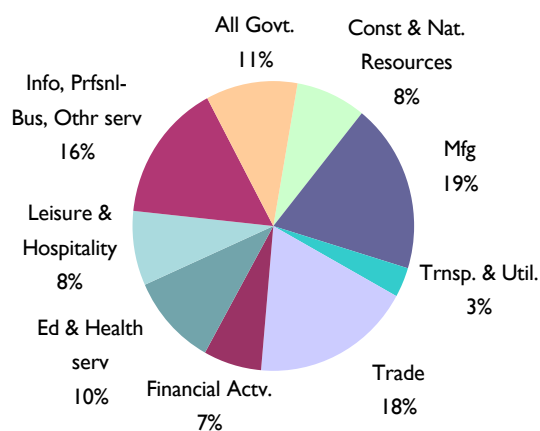
Introducing NAICS (North American Industry Classification System)

Starting in January 2003, employment data has been based on NAICS rather than SIC. Most labor market users are quite familiar with the SIC (Standard Industrial Classification) system. The SIC system was developed in the 1930s as a measure of the nation's economy. The system has been revised nearly every ten years since that time, but it is still closely tied to manufacturing industries, as manufacturing represented nearly 50 percent of the economy then. The old SIC system not only emphasized manufacturing, but was also based on ownership rather than

output. If a manufacturer owned a store, it might be included with manufacturing employment rather than retail trade.

Since the inception of the SIC system, the nation's economic base has changed from manufacturing to service based. Currently less than 12 percent of the nation's nonfarm wage and salary employees are working for a business involved in the manufacturing process. Nineteen percent of the county's workers are in the manufacturing sector, about 50 percent greater than the national average and very close to the state average.

Outagamie County Industry Distribution: 2002



With the change in the classification system, there is not a direct crossover to make a simple comparison with previous year's data. The table below shows an approximation of the difference in the classification systems. The new system places a stronger emphasis on the service sectors which have been growing faster than the goods producing sectors during the last 30 years. This should provide planners and counselors better and more timely information on changes that have occurred in the community and to project future change.

Of significance, is the creation of new sectors to

(Continued on page 7)

2002 Industry Employment in Outagamie County: A comparison of two classification systems

| NAICS Super-sectors | Employment | Distribution | SIC Industry Divisions | Distribution |
|---|------------|--------------|--|--------------|
| Construction, natural resources & mining | 8,026 | 8% | Construction & Mining | 8% |
| Manufacturing | 18,792 | 19% | Manufacturing | 19% |
| Transportation, warehousing & utilities | 3,400 | 3% | Transportation, utilities & communication | 6% |
| Trade (wholesale & retail) | 18,119 | 18% | Wholesale trade | 5% |
| | | | Retail trade | 20% |
| Financial activities | 6,464 | 7% | Finance, insurance & real estate | 6% |
| Information, professional & business services, other services | 15,631 | 16% | Services & misc (incl. agr, forestry, fishing) | 25% |
| Education and health services | 10,332 | 10% | Government | 10% |
| Leisure & hospitality | 8,148 | 8% | | |
| Government | 10,452 | 11% | | |

Source: WI DWD, Bureau of Workforce Information, Current Employment Statistics Program, March 2003

Outagamie County Workforce Profile

provide information on the information industry and the leisure and hospitality industry. These and other service sector jobs have shown more growth locally as well as nationally. Many of the positions in the service industries are professional jobs, and will require a higher percentage of college educated workers. In the meantime, manufacturing remains a primary source of employment in the county. Two

of the ten largest industry groups in the county are manufacturing. Also, of the ten largest public and private employers in the county, two of these are from the manufacturing sector. While manufacturing remains important in the area's economy, it has also been one of the hardest hit in terms of employment loss, both locally and nationally during this latest economic slowdown.

Top 10 Industry Groups in Outagamie County

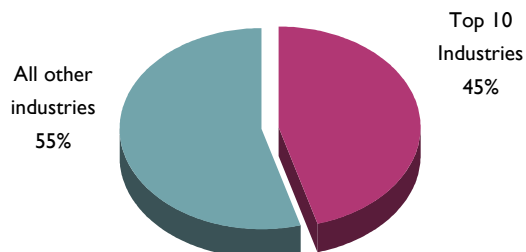
| Industry Group | March 2003 | | Numeric change 2002 - 2003 |
|---|------------|-----------|-------------------------------|
| | Employers | Employees | |
| Educational Services | 36 | 6,734 | 17 |
| Food Services and Drinking Places | 285 | 6,466 | 432 |
| Specialty Trade Contractors | 420 | 5,440 | 243 |
| Paper Manufacturing | 27 | 5,014 | 154 |
| Administrative and Support Services | 182 | 4,950 | -250 |
| Food Manufacturing | 31 | 4,258 | -360 |
| Insurance Carriers & Related Activities | 118 | 3,331 | 201 |
| General Merchandise Stores | 17 | 3,095 | 83 |
| Ambulatory Health Care Services | 200 | 2,993 | 111 |
| Professional and Technical Services | 294 | 2,913 | 26 |

*data suppressed to maintain confidentiality

Top 10 Employers in Outagamie County

| Company | Product or Service | Size |
|----------------------------------|--|---------|
| Thehealthcare, Inc. | Offices of physicians (except mental health specialists) | 1000 + |
| Appleton Area School Dist | Elementary & secondary schools | 1000 + |
| Thrivent Financial For Lutherans | Direct life insurance carriers | 1000 + |
| Appleton Papers, Inc. | Coated and laminated paper manufacturing | 1000 + |
| Sara Lee Corp. | Meat processed from carcasses | 1000 + |
| Fox Valley Technical College | Junior colleges | 1000 + |
| Wal-Mart Associates, Inc. | Discount department stores | 1000 + |
| County of Outagamie | Executive & legislative offices, combined | 1000 + |
| Miller Electric Mfg. Co. | Welding and soldering equip. manufacturing | 1000 + |
| St Elizabeth Hospital, Inc. | General medical & surgical hospitals | 500-999 |

Share of jobs with top 10 industries



Share of jobs with top 10 employers



Source: WI DWD, Bureau of Workforce Information, ES-202 special report, First quarter, 2003

Outagamie County Workforce Profile

When looking at the overall wage structure in the county, most industry groups fall relatively close to the state average. Overall the county's average wage is at 99 percent of the state. There are several exceptions to this. One is the professional and business services industry group at 79 percent of the state average, and the other is the leisure and hospitality industry at 86 percent of the state average. These wages do not necessarily reflect average hourly wages, but are the total industry wage paid divided by the number of workers. Differences in jobs and average weekly hours greatly affect differences between industries and regions.

Although manufacturing is not the largest industry group in the county, it does provide the largest portion of wages paid in the county. Just under 26

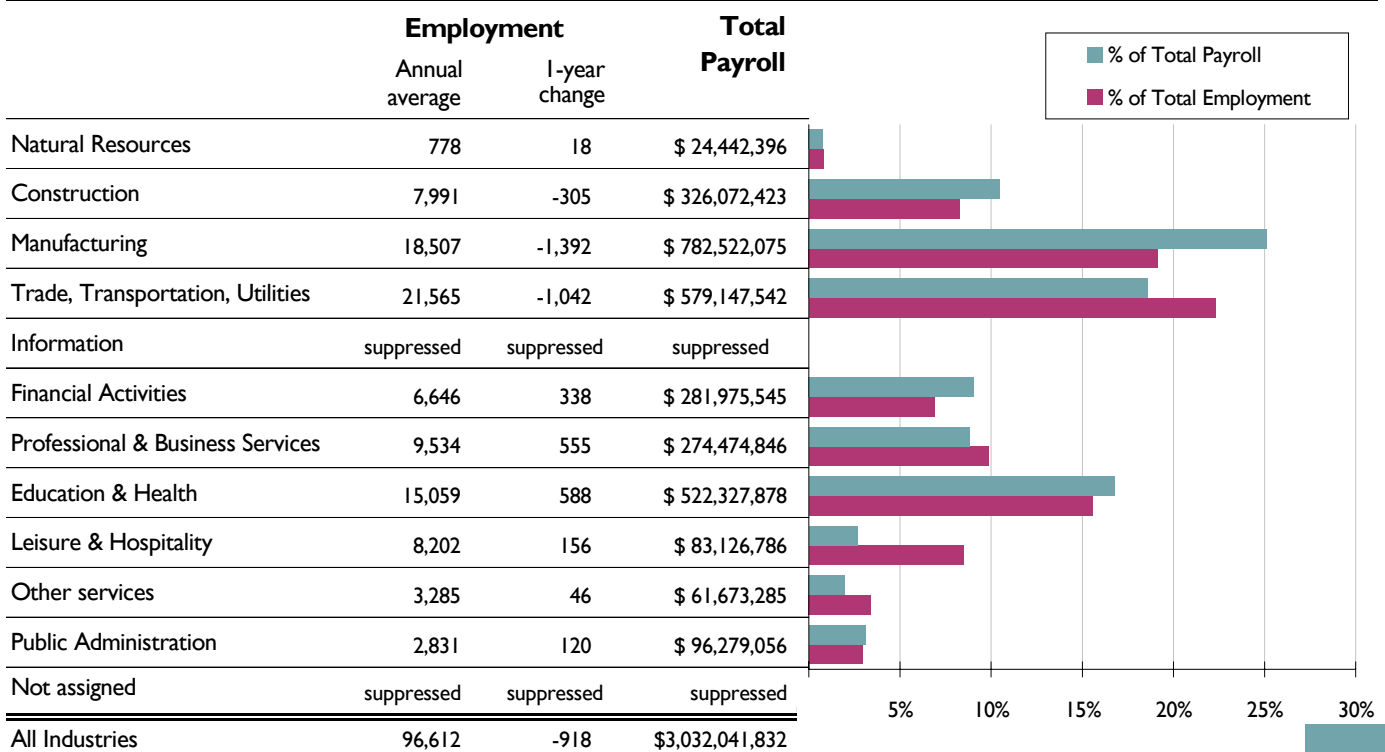
Average Annual Wage by Industry Division in 2002

| | Average Annual Wage | | Percent of | 1-year |
|----------------------------------|---------------------|------------------|------------|------------|
| | Wisconsin | Outagamie County | Wisconsin | % change |
| All Industries | \$ 32,422 | \$ 32,217 | 99% | 1.6% |
| Natural resources | \$ 25,481 | \$ 31,417 | 123% | -0.5% |
| Construction | \$ 39,649 | \$ 40,805 | 103% | -1.1% |
| Manufacturing | \$ 40,584 | \$ 42,282 | 104% | 2.7% |
| Trade, Transportation, Utilities | \$ 28,422 | \$ 26,856 | 94% | 3.5% |
| Information | \$ 38,871 | suppressed | suppressed | suppressed |
| Financial activities | \$ 40,337 | \$ 42,428 | 105% | 2.0% |
| Professional & Business Services | \$ 36,324 | \$ 28,789 | 79% | -0.2% |
| Education & Health | \$ 33,768 | \$ 34,685 | 103% | 2.9% |
| Leisure & Hospitality | \$ 11,837 | \$ 10,135 | 86% | 4.5% |
| Other services | \$ 19,500 | \$ 18,774 | 96% | 1.0% |
| Public Administration | \$ 33,769 | \$ 34,009 | 101% | 0.2% |

Source: WI DWD, Bureau of Workforce Information, Covered Employment & Wages, August 2003

percent of the county's wages come from this industry, which provides 19 percent of the county's jobs. The largest industry group is the trade, transportation and utilities sector. This group provides just over 22 percent of the county's jobs and about 19 percent of the county's total wages.

2002 Employment and Wage Distribution by Industry in Outagamie County



Source: WI DWD, Bureau of Workforce Information, Covered Employment and Wages, August 2003

Per Capita Personal Income

Per capita personal income (PCPI) includes income from wages and self-employment, assets (dividends, interest, rent) and transfer payments (social security, insurance, welfare, pensions) divided by mid year total population estimates.

The majority of PCPI in Outagamie County comes from net earnings, with smaller percentages coming from dividends, interests payments and transfer payments. The percent from net earnings is just slightly

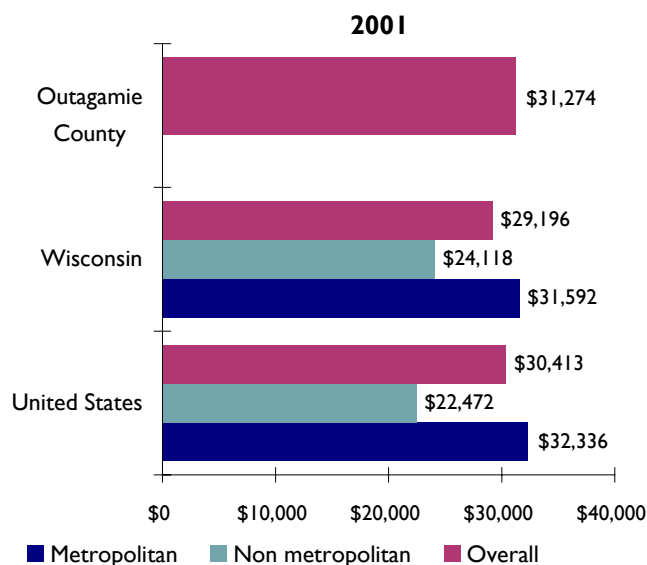
higher than the state and national averages.

Offsetting that are the portions of income coming from dividends and interest as well as transfer payments, which includes pension which were lower than the state or national averages.

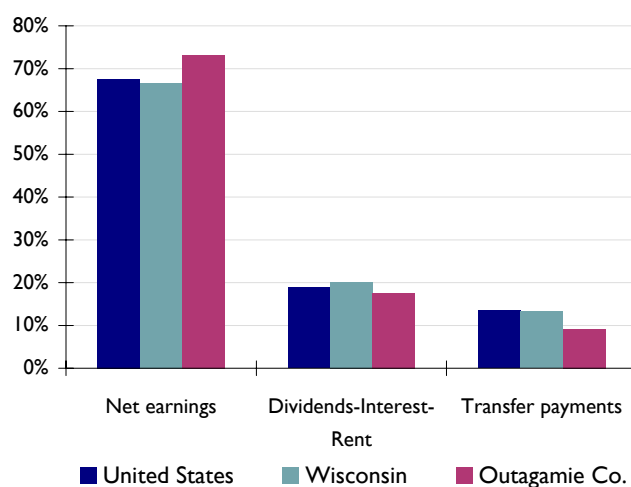
The PCPI in the county is 31,274, which is above the state level of \$29,196 and the national level of \$30,413. PCPI has grown faster in the county in the last year and over the last five years.

Per Capita Personal Income

| | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | Percent Change | |
|------------------|----------|----------|----------|----------|----------|----------|----------------|--------|
| | | | | | | | 1 year | 5 year |
| United States | \$24,270 | \$25,412 | \$26,893 | \$27,880 | \$29,760 | \$30,413 | 2.2% | 25.3% |
| Wisconsin | \$23,301 | \$24,481 | \$26,004 | \$26,926 | \$28,389 | \$29,196 | 2.8% | 25.3% |
| Outagamie County | \$24,348 | \$25,156 | \$26,124 | \$27,671 | \$29,768 | \$31,274 | 5.1% | 28.4% |



Components of Total Personal Income: 2001



Source: US Dept. of Commerce, Bureau of Economic Analysis, State & Local Personal Income, May 2003, CAI-3, CA05

WWW addresses of source data

Wisconsin population estimates and projections:

<http://www.doa.state.wi.us/dir/index.asp>

Education levels of population, labor force participation rates, commuting patterns:

<http://www.census.gov/main/www/cen2000.html>

Labor force estimates (employed and unemployed), industry employment, average annual wages:

<http://www.dwd.state.wi.us/lmi/>

Occupations in-demand:

http://www.dwd.state.wi.us/lmi/wda_map.htm

Per Capita Personal Income:

<http://www.bea.gov/bea/regional/reis>

Profile author:

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